



# CITY OF SUMMERSIDE COMMUNITY SERVICES DEPARTMENT STRATEGIC PLAN 2012-2017



## VISION

"All residents of Summerside enjoy and receive the broad benefits of recreation, in facilities and open spaces that are interesting and energizing; inviting and safe; financially and environmentally sustainable. Through these opportunities Summerside's residents engage in the life of their community and contribute to its wellbeing."

The Strategic Plan for the City of Summerside Community Services Department was prepared by **dmA Planning & Management Services**. This Strategic Plan report is the second of two documents, the first being the Technical Background Report. Information used to prepare the Technical Background report included input from residents, and stakeholders and documents provided by the City. The strategic framework in the Final Report was prepared in partnership with staff and council representatives.

**Final Report Submitted June 18<sup>th</sup>, 2012.**

June 15, 2012

Mr. Bobby Dunn, Director  
Summerside Community Services Department  
Summerside PEI

Dear Mr. Dunn;

It is our pleasure to forward the final Strategic Plan for the City of Summerside Community Services Department. We have enjoyed our work with you and with other members of your Department and the City as a whole.

It is our sincere hope that the Strategic Plan provides clear guidance toward its vision. These are important community services, and the City's staff and members of Council are commended for embarking on this initiative.

I wish you all the very best and look forward to hearing how this Plan serves the Summerside community through the next five years.

Sincerely



Wendy Donovan  
Principal

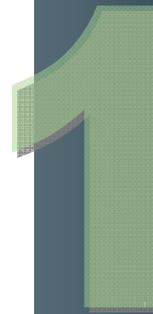
## Table of Contents

<b>1.0</b>	<b>INTRODUCTION &amp; OVERVIEW</b>	<b>1</b>
1.1	Definitions of Key Terms	2
<b>2.0</b>	<b>TECHNICAL BACKGROUND REPORT</b>	<b>4</b>
2.1	Planning Context	4
2.2.1	Population and Socio Demographics	4
2.1.2	Health Indicators	5
2.1.3	Recreation Service Trends and Forecasts	5
2.1.4	Service Delivery System	5
2.2	Consultation Summary	6
2.3	Needs Assessment	6
<b>3.0</b>	<b>SERVICE DELIVERY FRAMEWORK</b>	<b>7</b>
3.1	Target Market	8
3.2	Vision Statement	9
3.3	Outcomes	10
3.4	Service Delivery Principles	11
3.5	Goals	12
<b>4.0</b>	<b>ACTIONS</b>	<b>13</b>
4.1	Timing of Implementation of Actions	14
4.2	Access to Benefits of Recreation	15
4.2.1	Actions for Access to Benefits of Recreation	15
4.3	Partnership Development	20
4.3.1	Actions for Partnership Development	20
4.4	Infrastructure and Open Space	23
4.4.1	Actions for Infrastructure and Open Space Maintenance	23
4.5	Fiscal Sustainability	25
4.5.1	Actions for Fiscal Sustainability	25
4.6	Promotion and Communication	30
4.6.1	Actions for Promotion and Communication	30

---

<b>4.7 Policies and Planning</b>	<b>33</b>
4.7.1 Policy and Planning Initiatives	33
<b>4.8 Staffing</b>	<b>36</b>
4.8.1 Actions for Staffing	36
<b>5.0 IMPLEMENTATION</b>	<b>40</b>
<b>5.1 Costing and Implementation Considerations</b>	<b>40</b>
5.1.1 Summary of Financial Implications	45
5.1.2 Financing Approaches	46
<b>5.2 Monitoring the Strategy</b>	<b>48</b>
5.2.1 Indicators to Monitor the Plan's Achievement	48
<b>5.3 Updating the Strategy</b>	<b>49</b>
<b>ACKNOWLEDGEMENTS</b>	<b>50</b>

# **INTRODUCTION & OVERVIEW**



## 1.0 INTRODUCTION & OVERVIEW



Organizations prepare strategic plans to make fundamental changes in response to significant challenges in their environment. It is not a “business as usual” plan, nor is it a plan that covers everything an organization does. A strategic plan charts a path of clear priorities, based on a vision of the desired future. It outlines principles for *how* the organization will achieve its goals, and a finite list of goals with the best chance of achieving the vision.

The City of Summerside can be justifiably proud of its extensive and impressive recreation and open space infrastructure. The challenge is to ensure these remarkable opportunities are available to residents and visitors long into the future, through strong and stable management, clear and strategic direction, able partnerships and sustainable financial support. The Community Services Department (CSD) undertook this plan to “strategically manage” the Department through to 2017.

### Phase One – Needs Assessment

The study began with documentation of the current state of the Department’s “environment” to answer the question “*Where are we now*”. This information is in the Technical Background Report, and includes:

- Services of the CSD, resources (staff, facilities, financial etc.) available, role within the larger administrative structure;
- Socio-demographic, population and service trend profile;
- Input from the community and stakeholders.

(See Section 2.0 for highlights of the Technical Background Report printed and submitted as a separate document)

### Phase Two – Strategic Framework

Senior Department and City staff along with three City Councillors participated in a visioning workshop to provide input to the key elements of the service framework, to answer the question “*Where do we want to be in the future*”. (See Section 3.)

### Phase Three – Strategic Plan

The Strategic Directions (actions), answer the questions “*How will we get there*” and “*How will we know if we are there*”. (See Sections 4.0 and 5.0)

## 1.1 Definitions of Key Terms

The terms defined in this section are important terms in this report. The definitions reflect the context used in this strategic plan.



**Actions:** Specific and measurable initiatives (programs, policies, facilities, staff, operations etc.) that contribute to the realization of a goal.

**Benefits:** The phrase “benefits of recreation” and in this document used often simply as “benefits” refers to the *personal, social, financial* and *environmental* outcomes that come from participation in recreation. The term comes from the Benefits of Recreation project that began as a compilation of literature related to benefits in the late 1980’s. This has been updated several times and adopted as a key document throughout Canada and in many other countries.

**Community Organizations:** Not-for-profit largely or completely volunteer groups who provide many of the recreation and sport activities available throughout the City. These organizations may rent a major amount of hours in the City’s facilities. It is common for municipalities to subsidize the actual cost of use of facilities and parks to reflect the community benefits that accrue from the work of these groups.

**Community Services Department (CSD):** The department of the City of Summerside responsible for recreation and parks and events across the City.

**Events:** Events are a component of the services currently provided by the CSD often within the CUP but also in other parks and facilities of the City. Unlike programs they usually take place over a single day or weekend, are one-off (e.g., a concert, competition, or community festival) rather than continuing activities.

**Goals:** Broad statements that describe *what* the organization will do to achieve its vision. Goals can have a number of actions that help achieve the goal. Together goals create the environment and results that achieve the future vision.

**Major Renters:** Major renters in this context are for-profit groups (to differentiate them from not-for-profit community groups) who lease or rent the City’s facilities on an ongoing or longer-term arrangement.

**Outcomes** The benefits or results of participation in the services provided by the Department. Outcomes are measurable.





**Recreation:** The National Recreation Statement includes those activities in which an individual chooses to participate in their leisure time including sport, physical activity, arts and cultural activities. In this Plan the focus is on active recreation – recreational sport participation, individual active activities such as walking, biking, skateboarding, swimming etc. The reason for this focus is the importance of activity in a healthy lifestyle and the current focus on health and wellness in all levels of government.

**Service Principles:** Guiding statements that describe *how* the services of the Department will be provided.

**Target Market:** The major or primary benefactor of the services delivered by the Department.

**Vision:** A description of the planned and desired future that will result when goals are reached.

# HIGHLIGHTS

---

## TECHNICAL BACKGROUND REPORT

2

## 2.0 TECHNICAL BACKGROUND REPORT



The Technical Background Report is available from the Community Services Department for those who wish to review it in detail. Section 2.0 presents highlights of that report.

### 2.1 Planning Context

#### 2.2.1 Population and Socio Demographics

Mobility, language, income and education demographics, as well as overall population, and anticipated growth influence the recreation activities that community residents prefer and the recreation spaces that are most appropriate.

The City of Summerside's population is stable, increasing and decreasing only slightly over the last few census periods. The population is homogeneous with limited in-migration. English is the predominant language spoken and few residents classify themselves as either visible minority or aboriginal.

The population is aging, which simply means that there are increasingly fewer young people and more older-adults. This has implications for demand – considerable demand for activities of interest to older adults for example. There are however, almost 7,000 residents under the age of 44 and therefore reasonable demand for services for children, youth and younger families.

The average income is slightly lower than the provincial average with a higher percent of single parent families. Single-parent led families often have fewer resources than two parent families. Households with older adults (although still “younger” older adults rather than those currently in their late 70's and above) may have greater resources to spend on recreation services. These two points have implications for pricing and market demand.

### 2.1.2 Health Indicators

Healthy active living is a priority for most public recreation providers. Those who live in Atlantic Canada are on average less active and have higher incidence of obesity than other areas of Canada. The City of Summerside provides a wide range of indoor and outdoor facilities to support a wellness agenda.

### 2.1.3 Recreation Service Trends and Forecasts

Parks and recreation activities, and how they are delivered, evolve, fueled by changing technologies, community and societal concerns/values and challenges, available resources, and demographic realities. The City of Summerside has embraced many of the recent trends including trail development, indoor walking track, and consolidation of indoor and outdoor facilities.

Trends that will be influential in this Strategy are:

- Move to reduce barriers (financial, physical, social) to participation in community recreation;
- Initiatives designed to create healthy living environments and reduce social factors creating illness;
- Changes in the nature of programming for older adults to reflect changing needs and resources of *younger* older adults;
- Pursuit of partnerships for service delivery.

### 2.1.4 Service Delivery System

This strategy was prepared for the City's Community Services Department, which is responsible for indoor and outdoor recreation and park facilities, events held at the CUP and throughout the City, and liaison with the many community sport and recreation organizations who deliver programs. Other agencies such as the Boys & Girls Club, YMCA, and Generation XX also provide recreation services both independently and at times in partnership with the City.

The primary indoor facility is the Credit Union Place. Parks, trails, and outdoor spaces are distributed throughout the City. A significant waterfront trail, with a number of north south connectors, provides opportunities for walking, biking, roller blading etc., throughout Summerside. Since the opening of the Credit Union Place (CUP) the City has added major event promotion and management to its community services. This has significantly increased the workload of existing staff and focused service provision by the City to its major indoor site.

Municipal staff in the Economic Development and Culture Department are responsible for artistic and heritage services. The City also supports non-municipal culture providers through annual grants.

## 2.2 Consultation Summary

Consultation activities included key informant interviews; focus groups; a public meeting; meeting and survey with stakeholder groups; and an online comment form for residents.

Predominant themes in these consultations included:

- The importance of fiscal sustainability;
- The need to be sensitive to costs of programs and facilities to encourage broad participation;
- Staff resource issues including the need for additional supervisory level staff for the CUP;
- Department role in program delivery;
- Support to volunteers and volunteer organizations;
- Communication;
- Leadership and outreach;
- Pursuit of partnerships for service delivery;
- Department role relative to management of major events designed to attract visitors and tourists.

## 2.3 Needs Assessment

An analysis of strengths, weaknesses, threats and opportunities (SWOT) was completed and used in the needs assessment. Both the SWOT and needs assessment can be read in detail in the Technical Background Report.

In summary, the assessment indicated:

- There is limited need for any additional indoor or outdoor recreation. Facility needs identified (e.g., multi-purpose program space, skateboard park) are currently being addressed.
- Parks and trails are well supplied and distributed. There appears to be a larger number of small parks than is either needed or efficient.
- There are opportunities to develop program partnerships with a number of complementary agencies in the City.
- The need for more, and more effective communication with patrons, the community and stakeholder groups was noted.
- Maintenance issues, which appear to be a consequence of limited staff resources, were identified.
- Staff complement in the context of operation of recreation services and major events was highlighted as concern, as was the appropriate placement of event services in the City administration, and the need for a general manager or facility coordinator of the CUP.

# **SERVICE DELIVERY FRAMEWORK**

3

### 3.0 SERVICE DELIVERY FRAMEWORK



The Strategic Plan includes three components:

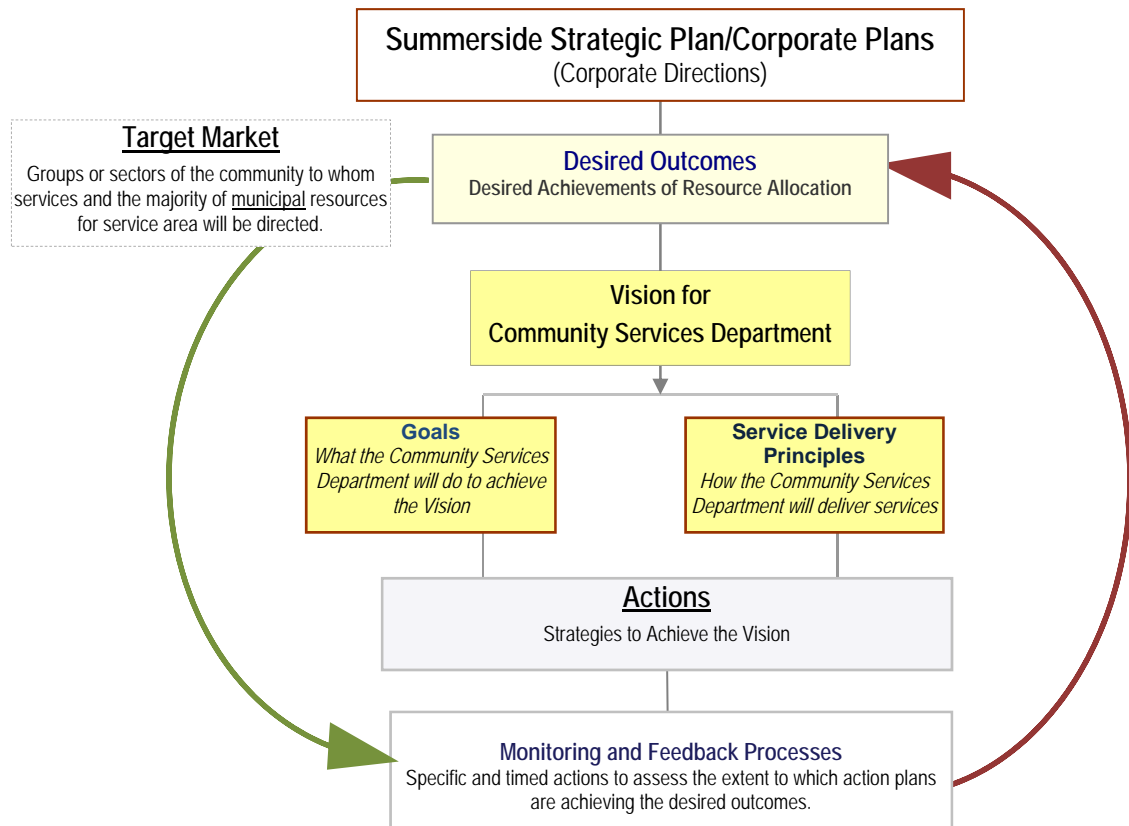
**Service Delivery Framework:** The vision, service delivery principles, and goals - elements that guide the entire plan. Two additional elements are incorporated within this framework – (1) the target market or the primary recipients of the organization's services and (2) outcomes, the intended consequences or results of goals achieved. Figure 3.1 illustrates the relationships of the various elements of the Framework.

**Actions:** Initiatives (programs, policies, facilities, staff resources etc.) required to achieve goals; and

**Monitoring:** Activities to ensure the organization achieves its vision.

Figure 3.1 illustrates the interrelationship of the components of the Service Delivery Framework.

Figure 3.1 Service Delivery Framework



### 3.1 Target Market

The active recreation and sport needs and interests of Summerside residents, inclusive of all ages, abilities or financial capacity, is the primary target market of the Community Services Department.

Clearly identifying the primary market for an organization's services is an important consideration for public service providers. Organizations require guidelines to allocate finite resources (staff, financial, infrastructure, etc.) to achieve their strategic goals. Public leisure services are potentially so broad it is common for these organizations to be stretched to, or beyond reasonable limits, without a clear rationale for saying yes or no to requests. A clearly defined target market provides guidance in these situations.

The Community Service Department's staff resources are small relative to its responsibilities. The Department is responsible for filling the major event facility with stakeholders, tenants and events to help to pay its significant operation costs. As well, the Department continues to be responsible for all of the recreation and park services they managed before the opening of the CUP. This Strategy recommends that the Department's primary responsibility is to provide City residents and community volunteers with recreation and sport opportunities.

The Strategic Plan recommends that Summerside residents: children, youth, adults and older adults, able bodied and disabled, advantaged and financially disadvantaged; involved in active recreation and sport at the community level (i.e., not elite sport<sup>1</sup>), are the Department's primary market. This is consistent with the role of a majority of contemporary public leisure providers, and with the significant need and opportunity for active, healthy recreation experiences. This role is also consistent with the City's 2004 Strategic Plan that identifies a healthy community as one of its four priorities and includes a goal to become "one of the healthiest communities in Canada"<sup>2</sup>.

The City and CSD currently provide considerable resources to attract visitors and tourists to major sporting and entertainment events at the CUP. This role, while perhaps secondary to the Department's primary role, often consumes a majority of the Department's staff resources, with consequences for its primary role. Major events are designed to promote the City and attract tourists, potential business and residents.

<sup>1</sup> The term *elite* denotes sport participants in national and international sporting events who wish to have infrastructure and resources specifically designed to support their ability to train and compete at that level.

<sup>2</sup> Summerside Strategic Plan (2004) Page 13



With an understanding that most major events will be held within the CUP, and that this facility's management is the responsibility of the CSD, this Plan will discuss the allocation of resources so that the City can continue to support this City-wide market. (See section 4.0)

### 3.2 Vision Statement

A vision statement paints a picture of what the City could be in the future (2017) with respect to the services provided by the Community Services Department. The vision is achieved when all goals are met and service delivery principles followed. The vision is both optimistic and realistic.

#### Vision for Community Services Department in 2017

All residents of Summerside enjoy and receive the broad benefits of recreation, in facilities and open spaces that are interesting and energizing; inviting and safe; and financially and environmentally sustainable. Through these opportunities Summerside's residents engage in the life of their community and contribute to its wellbeing.

The use of the word "All" indicates neither age, physical or mental ability, or financial capacity will be a barrier to participation in the City's recreation and park services. This is a vision of inclusiveness and responsiveness. It is a vision that implies that Summerside's residents can take responsibility for their own health and wellbeing through participation in the opportunities provided by the City. It is a vision that defines the City's park and recreation spaces as spaces of activity and interest rather than forgotten or out of date.

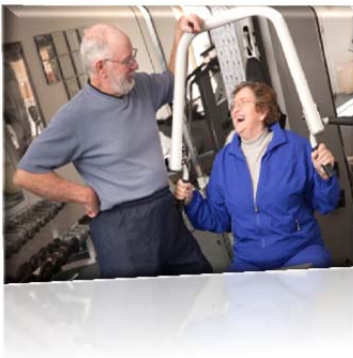


### 3.3 Outcomes

Outcomes are the anticipated results of an effective strategy and describe the benefits of the Department's services to those who participate in them, or benefit from other's participation<sup>3</sup>. Outcomes must be measurable, and should inform and guide the goals and service delivery approaches of the Department.

#### Outcomes

1. Residents of Summerside engage in active and healthy lifestyles contributing to overall health and quality of life.
2. Residents of Summerside experience opportunity for personal growth and development (e.g. building character, self-esteem and confidence).
3. Residents of Summerside are engaged in the activities of their community contributing to a socially integrated and cohesive community.
4. Volunteer community organizations and leaders are strong and sustainable.
5. Residents of Summerside have a positive sense of the natural environment and the importance of its sustainability.
6. The parks and recreation system in Summerside contributes to a sustainable environment for residents and businesses.
7. Visitors and Tourists are attracted to and welcomed to Summerside helping to sustain the local economy.



<sup>3</sup> For example, while a household may not have dependent children, their tax support of minor sports contributes to the health of children, in turn may lower health care costs to the community at large.

### 3.4 Service Delivery Principles

Service Delivery principles describe the manner in which the Community Services Department will deliver its services. The six principles commit the Department to provide services that are fiscally and environmentally sustainable, of high quality, inclusive, and responsive. Open and frequent communication and strong partnerships will be hallmarks of the Department's service delivery.

#### Service Delivery Principles

1. Department services incorporate practices that ensure financial and environmental sustainability.
2. Department recreation and park services are inclusive, ensuring that all residents regardless of age, ability or financial means have opportunities to engage in healthy, active leisure experiences.
3. Department services incorporate ongoing effective and informative communication.
4. Department services will be delivered through viable partnerships with community agencies, businesses and volunteer organizations, whenever appropriate.
5. Department decisions and activities reflect carefully and skillfully planned policies, processes and service plans.
6. Department services are provided by staff and volunteers who understand the benefits of recreation and who are skilled in developing opportunities to deliver these benefits.



### 3.5 Goals

Goals are broad statements that describe initiatives that bridge the gap between the present and the preferred future described in the Vision. The goals that guide the Community Services Department over the next five years call for initiatives that create inclusive activities and facilities, develop partnerships and policies, maintain facilities and open spaces, manage the Department's financial resources, engage well qualified staff, and develop improved communication processes.

#### Goals

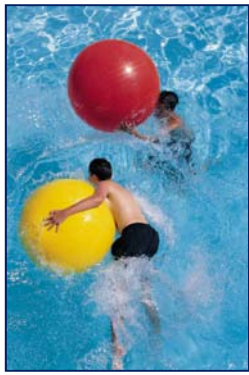
1. Provide all city residents the opportunity to experience benefits of active and healthy recreation.
2. Develop and maintain strong partnerships that support service delivery, community engagement, and accessibility.
3. Maintain infrastructure and open spaces for the enjoyment of the City's residents and visitors.
4. Create innovative and sustainable financial capacity for Department services.
5. Promote and communicate opportunities for active and inclusive engagement in healthy active recreation.
6. Maintain and attract qualified staff to deliver quality programs and customer service.
7. Ensure a high level of commitment to policies and plans.



**ACTIONS**

**4**

## 4.0 ACTIONS

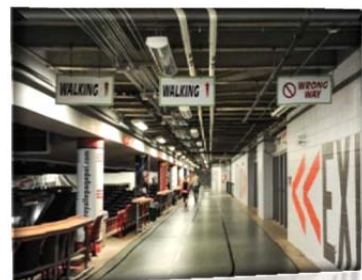


Section 4.0 presents the actions associated with each goal statement. Goals are broad, actions are specific. This Strategy does not identify, nor realistically could it, all the actions that could be undertaken related to each goal, although the quantity and quality of actions should be manageable with respect to resources.

The Strategic Plan assessed the need for goals and action statements for programs, facilities, parks and open space, and policy. The needs assessment found that the City of Summerside is well-provided with exceptional recreation infrastructure including indoor facilities, parks and open space. There are few if any additional needs in these areas. Challenges identified are largely of an operational nature to enable the City to maintain and utilize these resources most effectively and sustainably.

In the future the City, its partners and stakeholder groups, may identify additional actions. As new actions emerge, three questions should be asked: (1) Does this [new action] lead to achievement of a goal (s); (2) Can it be delivered in a manner that is consistent with the service delivery principles, and (3) Can we accommodate this within available resources?

Actions must be measurable by [performance] measures that assess whether or not an action has contributed to achieving a goal. For example, actions for the first goal "*To provide all city residents the opportunity to experience benefits of active and healthy recreation*" can have performance measures of quantity, which will be straightforward: Did the activity increase participation? Measures of quality are more difficult. Are the participants healthier? Exit surveys at the conclusion of an action, in which participants provide a self-assessment would be one way to measure performance.





## 4.1 Timing of Implementation of Actions

The priority assigned to actions indicates the timing of implementation, not relative importance.

- 
- |                    |  |
|--------------------|--|
| <b>High (H)</b>    | • To be acted upon immediately and fully implemented in 1-2 years.                               |
| <b>Medium (M)</b>  | • To be initiated as soon as possible but within the five-year time frame of the Strategic Plan. |
| <b>Ongoing (O)</b> | • To be acted on currently and on an ongoing basis.  |
- 

In this section the strategic goals are described, their relationship to outcomes, and a rationale for the actions. The actions following each goal contribute to that goal and address a concern noted in the needs assessment.

The actions noted are not the only things the CSD will do. Actions are those additional things or different ways that will address challenges that currently impede achievement of goals.

The Action tables note the Action, who is responsible for carrying out the actions, the priority or timing of the Action as well as any considerations that are deemed important e.g., predecessors, explanations, or related actions associated with other goals. Where there are related actions these are noted in "considerations".

For a majority of the Actions the lead identified is the Community Services Director (CSD). This means it is the Department head's responsibility to assign or oversee the task.



## 4.2 Access to Benefits of Recreation

<b>Goal</b>	Provide all city residents the opportunity to experience benefits of active and healthy recreation.
-------------	---

This goal has three important elements. First, the word “all” requires the City to enable *all* residents to participate. This is more than not barring participation. It may entail actions that support participation by low-income residents; enhanced promotion of opportunities that are no or low-cost such as use of trails and participation in community events; and partnerships with agencies who provide services to specific groups e.g., newcomers clubs, seniors groups, health care providers who deal with post cardiac rehabilitation, etc.

Second, this goal is specifically *active recreation*. While recreation includes more than active sport and recreation, this goal focuses on active recreation. The intent is to influence health and physical and mental wellness.

Third, this goal uses the word *benefits*. This means that the Department will purposefully direct resources and operate in a manner that achieves benefits of recreation as understood across the discipline.

The outcomes tied to this goal include active healthy lifestyles that contribute to overall health and quality of life, personal growth and development, and a socially integrated and cohesive community.

### 4.2.1 Actions for Access to Benefits of Recreation

The needs assessment, including the SWOT analysis in the Technical Background Report, identified a number of areas that if further developed would enhance access to the City’s recreation opportunities.

#### Volunteers

As with most communities, volunteers in Summerside provide a significant amount of the recreation opportunities available. They utilize the municipal infrastructure and receive other forms of support (e.g., annual grants, rental rates below actual cost, scheduling support etc.) for their programs. With so much resting on the availability of volunteers ensuring that these groups remain active in the community is critical – and strategic. The most common supports to Summerside groups are scheduling support, small annual grants, and reduced or no cost rental rates. More could be done to ensure the viability of these volunteers e.g., support for group development, coaching certification, executive responsibility training sessions etc.



## **Accessibility**

The City supports equitable access to active recreation through its low and no-cost opportunities, and through annual grants to groups that help to maintain low-cost programming.

Not all programs have a direct cost to the participant, e.g., trails open space, tennis courts and some summer events at the waterfront provide no-cost (to the participant) opportunities. The CSD should promote and communicate opportunities for low and no-cost services. Many communities provide formal fee assistance policies in partnership with various helping agencies that substantiate an individual's or family's need.

Persons with disabilities are often at a disadvantage when it comes to participation in recreation activities. Many are on some form of financial assistance putting them in the low-income category. As well, many with disabilities require the assistance of a helper to participate in activities. When helpers are required to pay this exacerbates situations of low-income. There is a need for both integrated and segregated programming. Ideally, individuals with disabilities are integrated within regular programming, understanding this may require the assistance of a helper. Persons whose disabilities are such that an integrated program is not possible benefit from participation in non-integrated activities. The CSD can support the recreational interests of these residents through partnerships with groups who provide specialized services to those with disabilities.

Age and stage of life have implications for participation. In some cases this is income related e.g., young families often have less financial resources than today's younger seniors who have good pensions and fewer financial commitments. Immigrants unfamiliar with Canadian culture or for whom English is not the working language often require additional support to participate. Parents with young children or adults who are full time caregivers of older parents or disabled children also find it difficult to participate in recreation as often as they wish.

## **Engaging the Community**

Those with loud and confident voices, financial and human resources, and who are politically savvy, generally make their needs known. Not all groups are equally proficient but their needs are equally important. Such groups benefit from advocates within the organization. Those with low incomes and/or disabilities often fall into this category. Youth is a group that falls into this category, particularly youth whose interests are not traditional sport and recreation activities. This issue was noted with respect to youth whose interests were more individually artistic (e.g., those who had basement bands or liked to paint graffiti) and groups such as skateboarders and BMX'ers. While the City is developing some of the facilities these groups would like to use, there does not appear to be a process of engagement in the decision processes.

Actions: Access to Benefits of Recreation	Lead	Priority	Considerations
<p>A-1: Communicate all the opportunities in the City to participate in low and no-cost leisure time activities and the benefits of this participation through press release, program brochure and a specifically focused brochure.</p>	CSD	H	<ul style="list-style-type: none"> <li>• There are currently many opportunities in the City to participate in low or no-cost activities. A well designed professional brochure that also outlines the health benefits of walking, participating in a community garden plot etc., illustrates how those benefits can be achieved with minimal cost and also promotes the benefits of that participation would be helpful.</li> <li>• A sponsor for this brochure e.g., an organization who would benefit from association with this initiative and with whom the City would benefit could be attracted.</li> </ul>
<p>A-2: Develop capacity within the CSD for volunteer and community development support. Develop processes including job descriptions, and associated policies, for this support and communicate its availability.</p>	CSD and HR Directors	M	<ul style="list-style-type: none"> <li>• This Action requires a job description that includes roles and responsibilities related to volunteer support and management, liaison with groups for the purpose of group development.</li> <li>• This Action requires development of policy(ies) outlining the role of the CSD with respect to volunteer support and community development.</li> <li>• While this position can incorporate the responsibilities of scheduling it is broader than the current Programming and Scheduling Co-ordinator.</li> <li>• This position is a new job description but not necessarily additional staff complement.</li> <li>• See Action G-3.</li> </ul>

Actions: Access to Benefits of Recreation	Lead	Priority	Considerations
A-3 Work with partner agencies, other City Departments and staff to develop a fee assistance policy and process to support access to programs by persons with low-income, including those whose income reflects a disability with implications for income level.	CSD Director	M	<ul style="list-style-type: none"> <li>Many partner agencies and community groups already provide fee assistance for their programs through their own fundraising including use of programs such as JumpStart etc. Consultation and collaboration with these groups is encouraged.</li> <li>Many communities provide formal fee assistance programs and information for these precedents can be gathered through discussion with other communities in the area. Example fee assistance policies can be found on the Lifestyle Information Network site <a href="http://www.lin.ca">www.lin.ca</a></li> </ul>
A-4: Develop policy to support access to facilities and programs by those with disabilities, to reflect but not be limited to: no-cost support for a helper or care giver to assist the patron; integrated programs provided by the City, special programs provided by agencies who work with persons with disability; broad communication of these opportunities.	CSD Director	M	<ul style="list-style-type: none"> <li>There are groups in the City who currently work with persons with disabilities and it is assumed and recommended that the CSD will work closely with these groups to develop appropriate policies. As with fee assist policies considerable information can be gathered through discussions with other communities, with RPEI and from <a href="http://www.lin.ca">www.lin.ca</a>.</li> <li>In addition to developing an appropriate policy it is important for Department staff to have sensitivity and an understanding of persons with disability. The PEI Council of People with Disabilities <a href="http://www.peicod.pe.ca">www.peicod.pe.ca</a> can provide helpful publications and support and may be available to assist with staff training if this is a new area for Department staff.</li> </ul>
A-5: Work with partner agencies, including area schools to expand use of the CUP, other City facilities, and schools.	CSD Director	M	<ul style="list-style-type: none"> <li>The YMCA, Boys &amp; Girls Club, Community Connections, area schools etc., would like better access to spaces within the CUP, often during non-prime time. Price is often a consideration. Well-communicated enhanced participation will help to promote the importance of these initiatives.</li> <li>After school programming within schools would have positive implications for children who may not have a parent at home after school and find the after school hours an opportunity to get into mischief.</li> </ul>

Actions: Access to Benefits of Recreation	Lead	Priority	Considerations
A-6: Work with existing participants of municipal programs, and with partners as appropriate, to identify barriers to participation other than ability to pay and consider how these might be addressed.	CSD Director	H & O	<ul style="list-style-type: none"> <li>Barriers could include communication and promotion deficiencies, absence of options such as child minding or older adult minding for adults who wish to participate but can't due to care responsibilities. Often needs of these individuals are understood by other agencies in the community, and their input would be an asset to managing those barriers. As well, the availability of a space and program e.g., for child minding could be managed directly by the CSD.</li> </ul>

## 4.3 Partnership Development

<b>Goal</b>	Develop and maintain strong partnerships that support service delivery, community engagement and accessibility.
-------------	---

This goal directs the Department to develop strong and viable partnerships with other agencies and community organizations to deliver recreation services. The CSD currently has partnership initiatives with the Boys & Girls Club, Generation XX, and East Prince Senior's Initiative (EPSI). These groups and others in the City have close connections and a good understanding of the needs of their respective cliental. This goal envisions a situation of co-development and promotion of programs, formal arrangements related to space and, perhaps most importantly partnerships that contribute to the vision and the specific goals of the Community Services Department.

In addition to the formal partnerships the Department can develop with incorporated agencies and other institutions, the City should view its work with community sport and recreation organizations as important partnerships through which goals and vision can be achieved. For example, in the not too distant past segments of many communities were not well integrated within community sports e.g., girls and women. While most communities have come a long way with respect to ensuring that girls and women have equal access to community programs and facilities other sub-groups in society still have a way to go e.g., those with disabilities. Municipalities can influence greater attention to marginalized groups through facility allocation policies, training and communication. The more the CSD views itself as a partner in service delivery with community groups rather than simply a "landlord" the greater will be the opportunity to influence services.

Outcomes include active healthy lifestyles that contribute to overall health and quality of life, a socially integrated and cohesive community, strong and sustainable community organizations, and a sustainable service delivery system.

### 4.3.1 Actions for Partnership Development

There are a number of organizations eager and willing to partner with the City. Some service partnerships are already in place. Limitations of staff resources make it difficult to ensure coordination and monitoring of partnerships. The CSD has operated largely as a manager of facilities and open spaces rather than a provider of programs and services. The actions in this section will harness the capacity of partnerships to achieve and support all goals of the Department's strategy. These actions include enhanced communication and collaboration, development and maintenance of formal partnership arrangements and performance measures, and concerted efforts to tackle significant issues through strong partnerships.

Actions: Partnerships to support service delivery, community engagement and accessibility		Lead	Priority	Considerations
B-1:	Establish a committee of agency and organizational service providers in the City who address the recreational, health and social needs of residents of all ages, for the purpose of identifying program and social needs, providing a multi-provider approach to service provision, and advising the City on policy directions that support access to recreation.	CSD	H	<ul style="list-style-type: none"> <li>The needs assessment identified a number of needs including those of youth not involved in sport, low-income families, youth at risk, persons with disabilities, people of all ages who need encouragement and opportunity to be sufficiently active to have positive implications on health and wellness. Non-municipal organizations in the City have program skills and staff resources but often lack facilities, or awareness of where facility options might be. Through conversation and collaboration within a group that meets regularly, pan-community initiatives can be developed.</li> <li>Performance measures should be developed as part of this action step, as should a method of evaluation and refocusing based on that evaluation.</li> </ul>
B-2:	Initiate discussion with Schools in Summerside to identify mutually beneficial opportunities for children and the community to better utilize the facilities of each organization with respect to active healthy recreation.	CSD Director	H	<ul style="list-style-type: none"> <li>Many communities have formal joint use agreements that outline the shared services and incorporate a method of tracking the mutual benefits of these services. In a number of provinces there is formal legislation to encourage and support community use of schools.</li> </ul>
B-3	Establish a biannual meeting with community sport groups to discuss issues of mutual concern and the ways these may be managed to the City and organizations' mutual benefit.	CSD Director	H	<ul style="list-style-type: none"> <li>These meetings should be an opportunity to effectively and efficiently engage community sport and recreation groups, to share and expand the benefits of recreation and manage issues in a responsive and mutually supportive manner.</li> </ul>

Actions: Partnerships to support service delivery, community engagement and accessibility	Lead	Priority	Considerations
B-4: Review facility allocation policies and procedures to ensure they outline the City's objectives related to inclusion, benefits and accessibility and share these policies and processes with community sport and recreation groups who utilize municipal sport and recreation infrastructure.	CSD Director	M & O	<ul style="list-style-type: none"> <li>The City has two methods to encourage and ensure the intents and objectives of the Department with respect to access, inclusion, healthy active recreation, and the benefits of recreation participation - through direct delivery of services and secondly through partnerships and influence.</li> </ul>

## 4.4 Infrastructure and Open Space

<b>Goal</b>	Maintain infrastructure and open spaces for the enjoyment of the City's residents and visitors.
-------------	---

The CSD provides some direct programming (fitness, swimming and community special events that take place in the summer). However, the Department's major responsibility is as the manager of indoor and outdoor infrastructure and open space. This is an important role and one that is appropriate for the City as the owners of this infrastructure. Maintaining these spaces involves the physical maintenance of indoor and outdoor space and initiatives that sustain these spaces in an environmentally and financially sustainable manner. With the development of the CUP there is some evidence that the demands of that significant space has reduced the capacity to maintain spaces outside the CUP. There is even some indication that existing resources have difficulty keeping pace within the CUP.

The outcomes tied to this goal include active healthy lifestyles that contribute to overall health and quality of life, a socially integrated and cohesive community, a sustainable natural and built environment for residents and businesses, and attraction of visitors and tourists to Summerside.

### 4.4.1 Actions for Infrastructure and Open Space Maintenance

The City provides a high standard of recreation, park, sport field and open space infrastructure. Summerside has a good supply of hard and soft surface trails with plans underway for additional north south links. Trails are no-charge to the participant as are the parks and now many of the active sport fields. There are excellent opportunities for all residents to participate in healthy active recreation activities. The needs assessment noted only a few additional facility needs and most of those are currently being developed.

With respect to recreation and park infrastructure, day-to-day maintenance was the only challenge identified. A small number of the items identified in the consultation process may simply require additional training or processes developed and shared with staff. The more significant concern is when under attention to maintenance reflects too few resources. In the context of a strategic plan it is difficult to assess whether there is too much work for the amount of staff available or if it is the way staff are allocated and trained. This is the task of an operational review.



Actions: Maintaining Infrastructure and Open Space	Lead	Priority	Considerations
<p>C-1: Each operational sector (e.g., pool, fitness, arena, parks, trails) should establish processes to regularly review maintenance issues - internally and with patrons - to identify realistic maintenance deficiencies. Deficiencies should be identified as: (1) requires different staff procedures (2) requires consistent staff training (3) required different/new instructions to patrons (4) reflects staff complement or distribution issues. New procedures to address issues that fall into 1, 2 and or 3 should be implemented immediately.</p>	CSD Director	H & O	<ul style="list-style-type: none"> <li>• Attention to maintenance is important for the comfort of patrons and the lifecycle of the infrastructure.</li> <li>• Where these concerns are easily remedied operational issues as outlined in the first three points staff should be required to identify, rectify and monitor to ensure that the challenge areas are improved and remain improved.</li> <li>• Where the challenge is related to a staff complement issue these require a different approach (see action C-2)</li> </ul>
<p>C-2: If a significant number of maintenance challenges do not reflect easily managed responses of training, new procedures for staff and/or patrons the CSD should undertake a workload assessment to confirm requirements and options to expand maintenance resources.</p>	CSD Director	H & O	<ul style="list-style-type: none"> <li>• If a significant number of maintenance challenges do not reflect easily managed responses of training, new procedures for staff and/or patrons they then likely reflect a problem with the infrastructure itself or with the resources available to address these challenges.</li> <li>• An assessment of resource requirements is an extensive process and may require external review or at least review by someone outside the CSD. Before undertaking an operational assessment of maintenance responses all opportunities to resolve these issues through training, communication and new procedures should be undertaken.</li> </ul>

## 4.5 Fiscal Sustainability

<b>Goal</b>	Create innovative and sustainable financial capacity for Department Services.
-------------	---

The CSD manages the City's most expensive and extensive infrastructure. Since the opening of the CUP staff have implemented a variety of initiatives to achieve greater financial sustainability for the CUP, and to maintain services beyond the CUP. Not all of these initiatives have had the intended or required affect. The CUP was designed with two distinct goals: (1) to provide citizens with enhanced recreation opportunities; and (2) to be a driver for economic activity in the tourism sector. The second goal had the opportunity to generate revenue to offset the facility's operating expenses. Within the most recent budget year staff in the events division have found enhanced financial sustainability in entertainment offerings and continue to work towards a more sustainable model. It has taken a number of years of operation to find the most appropriate mix of attracting and facilitating events to reach this current situation.

The City currently provides subsidies, in the form of *less than actual facility costs*, to two for-profit sports tenants. These organizations may bring new revenue (through new users) to the CUP, and that needs to be assessed. However, the City does not currently have clear policies to manage for-profit tenants or to indicate the circumstances by which they should receive a form of subsidy.

This goal calls for the CSD to ensure financial sustainability to support the ongoing availability of the service focus to their target market – the residents of Summerside involved in active healthy recreation.

The outcomes tied to this goal include strong and sustainable community organizations, sustainable services, and attraction of visitors and tourists.

### 4.5.1 Actions for Fiscal Sustainability

Summerside's residents and visitors enjoy a high standard of recreation and entertainment in the CUP, on trails and in the City's parks and cultural facilities. While some areas require attention, residents are generally satisfied with these services. Sustaining the recreation, sport and entertainment opportunities that exist rather than significantly enhancing them is one of the most important aspects of this Plan. The community likes what they have. There is no indication that service reduction would be supported. That said, there is no indication that residents or stakeholders are prepared to pay higher taxes or significantly higher user fees to retain services. Future actions must

focus on stable and enhanced revenue sources as well as new ways of providing services that reduce cost to the City.

Among the challenges identified in the initial phases of this Plan were the high cost of operation of the CUP, which limits resources for other services; no clear financial delineation between for-profit and not-for-profit community organizations with respect to fees and services; limited focus on partnerships that might reduce costs; and insufficient attention to attracting corporate partners. For each of these challenges there are opportunities.

### **Recreation and Entertainment**

Since the opening of the CUP the Community Services Department has increasingly focused on the entertainment aspect of leisure services. This focus reflects the need to bring in new revenue, desire to promote the City, and a belief that entertainment is an aspect of recreation. All of these points are reasonable. The challenge is to achieve those objectives in a fashion that does not undermine the CSD's other goals.

The City has moved in the direction of producing sport tourism products and being a rental facility for concert and convention rentals. The Entertainment component of the CUP has taken on new directions in rental of facilities in some instances, which aids to offset costs on events that the City produces.

### **Expanding Use of CUP**

Most facilities like the CUP easily program and rent space during prime time hours. Non-prime hours are more difficult to fill although operating costs remain similar to prime time hours. Non-prime hours are an opportunity to expand revenue with limited additional operating cost. New patrons might include special membership arrangements with businesses in the area for use during non-prime hours, arrangements with schools where area business sponsor use by school-children during the day. Use of the arena and the pool during school breaks for "for-profit" sport camps is another opportunity that has been financially successful in many communities.

### **Fees and Charges**

Costs for community groups to use the CUP and outdoor fields are reasonable. While there is no indication that community groups would pay higher fees it would be informative to have a clear sense of unit operating costs, to track expenses and illustrate the fiscal support the City provides (through taxes) to various recreation and entertainment activities.

Most communities provide a tax subsidy, either directly or through reduced fees and charges, to community organizations to use public facilities and provide services consistent with their goals. Summerside charges no, or a nominal fee, to community sport organizations to use outdoor fields. This is a reasonable position in that volunteer groups provide opportunities for active healthy recreation and sport. Where groups operate as for-profit organizations (whether or not they actually achieve a profit) most public authorities charge at least cost recovery for use of public facilities. Whether to charge only *recovery costs* or add a profit cost could be based on the degree to which a group's activities contribute to the goals of the CSD<sup>4</sup>. Summerside does not have a policy governing fees and charges to for-profit organizations, nor are the costs to the City related to for-profit groups well-documented.

### Service Partners

The CSD is largely a manager and renter of its recreation and park infrastructure. There are a few areas where the City is also a direct programmer e.g., bowling, aquatic lessons, fitness. Service partnerships with organizations such as the Boys & Girls Club and the YMCA for example, represent opportunity to both expand services to the community and bring more users and therefore revenue into the CUP. These partnerships also enable the City to expand into desired program areas without increasing staff complement.

---

<sup>4</sup> It is understood that the CSD is responsible for carrying out the City's goals as well as the Departments. Further, that some profit from the City's utility comes to the Department and may then offset the cost of these for-profit organizations, in which case reflecting these City-wide resources against City-wide costs would be an option to this situation.

Actions:	Sustainable Financial Capacity	Lead	Priority	Considerations
D-1:	Adopt a cost-centre budget process to track costs and revenues for events, entertainment and each major service area (e.g., aquatics, sport fields, event arena, community arena etc.) in the CSD.	CSD & Finance Directors	H & O	<ul style="list-style-type: none"> <li>The Department currently budgets using a traditional (rather than a 0-based) budget process that does project and track budgets by major areas. However, there is considerable informal transfer of staff from one cost area to another that does not seem to be formally tracked e.g., when staff in other areas provide support to entertainment and event activities. The intent is not to change that process, at least initially, but to clearly track staff and other costs related to each service area so that decisions can be made for staff allocation and fees and charges that address fiscal sustainability of various areas.</li> </ul>
D-2:	Identify and develop membership and program sponsorship opportunities that expand use of the CUP, with a focus on expanded use and membership during non-prime hours.	CSD Director & Unit Managers	H & O	<ul style="list-style-type: none"> <li>This action requires that staff identify such opportunities, develop specific membership promotions, and sell these opportunities.</li> <li>Unit managers should participate in development of program options and may require assistance with respect to preparation of promotions, marketing and selling these opportunities.</li> <li>This Action also supports attraction of for-profit specialty camps during school breaks and other appropriate times.</li> </ul>
D-3:	Using cost-centre expense tracking by unit of use, (e.g., hour, half day etc.) compare actual costs to unit rental charges, and use this information to establish fees and charges to specific users.	CSD Director & Unit Managers	H & O	<ul style="list-style-type: none"> <li>See D-1 related to cost centre costing.</li> <li>See D-5 related to fees and charges relative to type of group and strategic goals.</li> </ul>

Actions: Sustainable Financial Capacity	Lead	Priority	Considerations
D-4: Prepare marketing and promotional material for use in budget presentations, facility rentals etc., so that facility renters understand the basis for charges and, where appropriate, groups and the community, understand where tax subsidies are given and why.	CSD Director & Unit Managers	H & O	<ul style="list-style-type: none"> <li>• See D-5 related to fees and charges relative to type of group and strategic goals.</li> </ul>
D-5: Develop a policy to support tax subsidy for services that contribute to the goals of this Plan, and full cost recovery for facility use that does not connect directly to goals. Further, differentiate between volunteer groups and for-profit providers.	CSD Director	H & O	<ul style="list-style-type: none"> <li>• This action specifically uses the word volunteer rather than not-for-profit as many not-for profit groups operate with paid staff. It is assumed that groups that are entirely volunteer led already have considerable personal workload and additional fundraising that might be required in a situation where less subsidy is provided, would make them less viable.</li> <li>• There will be multiple group designations reflecting ability to pay the full unit cost of the facility and the degree to which they contribute to goals of this Plan.</li> </ul>
D-6: Develop service partnerships with the Boys & Girls Club, the YMCA, and others in the community who can enhance program services to the community while minimizing the need to add staff to the CSD for program services.	CSD Director	H & O	<ul style="list-style-type: none"> <li>• See all actions related to partnerships – B-1 to B-5. It is understood that groups such as the Boys &amp; Girls Club and the YMCA, have significant fundraising capacity both locally and through their national bodies. As well these groups have facility needs to provide their programs. By providing space at a reasonable rate the City can enhance programming, minimize their additional staff costs, and expand revenues through expanded use of facilities. For partners the opportunity to access facilities at a fair cost will minimize their need to fundraise for new facilities and will expand their program services.</li> </ul>

## 4.6 Promotion and Communication

Goal	Promote and communicate opportunities for active and inclusive engagement in healthy active recreation.
------	---

Communication was one of the key issues and challenges identified in the initial activities of this Plan. Need encompassed more communication, more effective communication, and ongoing communication. Communication includes both information out as in the case of announcements, updates, promotion and advertisement, and information in – consultation, and collaboration with residents, members, partners and stakeholders. This goal and its associated actions focus the Department on improvement in all forms of communication.

The outcomes tied to this goal include engagement of all residents in active healthy recreation, opportunities for personal growth, social integration and community cohesiveness and pride, financially sustainable services, pride and care of the natural environment, and attraction of visitors and tourists.

### 4.6.1 Actions for Promotion and Communication

Municipal staff have informal communications with various groups as well as more formal agreements related to annual grants and cooperation around some programs and services. The media and approach could be enhanced by better focus, consistency, and with different communication tools. We know for example that age has a great deal to do with the use of various communication media with younger residents being more adept with social media and other residents still more comfortable with traditional sources.

The City's website has been updated, and will be launched when it receives Council approval. The update will provide a broader view of the Community Services (and other) Department. Where there is an opportunity to link interactive healthy living sites such as *In Motion* or sites informing of financial support for sports and recreation e.g., JumpStart that is desirable. The CUP Events site does an excellent job of promoting entertainment and incorporates all activities in the CUP.

In addition to the sources used for communication, situations where enhanced communication approaches are needed, should also be addressed, e.g., when developing or changing facilities or park use.

Actions: Promotion and Communication	Lead	Priority	Considerations
E-1: Develop appropriate media and messages to promote and communicate the directions of this Strategic Plan.	CSD Director City Communication Staff	H & O	<ul style="list-style-type: none"> <li>Once received and approved by Municipal Council the Service Framework and actions of this Strategy should be promoted to staff of the CSD and other City Departments, stakeholders, current and potential partners and the community at large.</li> <li>Media used for communication should include electronic, social media, print media including newspapers, Department activity brochure and a marketing piece (brochure) specific to the Strategy.</li> </ul>
E-2: Develop a website presence for recreation services that engages the site visitor, promotes the benefits of recreation and opportunities for participation. Ensure that the site is interactive with opportunities to receive information and provide input through social media such as Facebook and Twitter.	CSD Director City Communication Staff	H	<ul style="list-style-type: none"> <li>Links to information on services, benefits, opportunities etc., are important considerations.</li> <li>To be successful and useful websites require excellent initial design as well as constant monitoring and updating. This may present a challenge to a small (staff) department that is already operating at capacity. See actions in 4.7.</li> </ul>
E-3: Enhance communication to residents and specifically users of the CUP related to upcoming events, closures etc.	CSD Director	H	<ul style="list-style-type: none"> <li>The CUP has digital sign options that provide information related to events but still uses hand written flip chart notes to relay messages to members e.g., regarding track or pool closures. Expanded use of digital signage and information in brochures and other documents provided to members and users of the CUP regarding where to learn about upcoming events, as well as use of social media, can enhance the exchange of information.</li> </ul>



Actions: Promotion and Communication	Lead	Priority	Considerations
E-4: Develop and communicate opportunities for community engagement related to development of new infrastructure, changes to existing infrastructure and services.	CSD Director	M	<ul style="list-style-type: none"> <li>• Communication of opportunities for input, whether for City-wide initiatives such as the creation of this Strategic Plan or for more focused activities such as the redesign of a park or development of a skateboard park, is important but often a challenge. It is particularly challenging given the limited staff resources available within the CSD.</li> <li>• The City is in the process of hiring a communications director whose responsibilities will include support to City Departments.</li> <li>• This type of communication requires media and promotion support and expertise as well as process (e.g., methods of community engagement) support. See Actions in 4.6</li> </ul>

## 4.7 Policies and Planning

<b>Goal</b>	Ensure a high level of staff and Council commitment to policies and plans.
-------------	--

Policies and plans, no matter how good, are only effective if they are in day-to-day use. Policies and plans that spend their useful life on a shelf are not worth the resources that created them. The strategic plan will guide all key aspects of the Department – the services it delivers and how they are delivered, the partnerships pursued, and the policies created, to achieve the vision. A number of the actions associated with the goals recommend development of new policies.

### 4.7.1 Policy and Planning Initiatives

The assessment portion of this Plan identified and documented a number of procedures related to the activities and services of the Department but little in the way of policy to guide the Department's operation.

Summerside has an Official Plan that could include some of these policies (e.g., park hierarchy, playground allocation, park acquisition). The OP notes that the City has the option to receive land or cash in-lieu developers for parklands, and how that cash in-lieu can be used<sup>5</sup>. A document (still in draft) titled Recreation and Green Plan was prepared internally in 2010. It documents parks and outdoor facilities, priorities for park acquisition, improvements and operations, and guidelines for the best application of park levies, including type of parks and their distribution and service level, joint use of public parks and playing fields, and implementation of the greenway system. CSD staff are currently working on a playground policy that appears to focus on assessment and maintenance standards.

---

<sup>5</sup> Parkland cash levies and the receipts of selling any surplus parklands, which will be reserved solely for acquiring, expanding or improving parks or trails (but not for park operations and maintenance, or for special events). From Section 9.2 of the City's Official Plan.

## Policies

Whether the recommended policies exist but need to be updated or need to be developed they should reflect the directions of this Strategy. It is common to use the term policy and procedure interchangeably. Policies are guiding principles that reflect the belief and position of the organization and therefore are sanctioned by the organization's decision body e.g., municipal council. Procedures outline how the policy will be implemented.

Where a new policy is likely to be controversial either because it takes a position that is not generally accepted by the community or where that position means that someone else will need to give up something, or give more of something (taxes) it is particularly important to develop policy using a sensitive and inclusive approach. Such approaches would incorporate consultation with stakeholders and those affected either positively or negatively, documentation of current state and benefits of the policy, and a process of review and revision, before it becomes a public policy.

Some of the policy needs discussed in the course of developing this Plan include:

1. **Fee Assistance Policy:** Outlines the City's position on how and when it might provide financial assistance to enable low-income individuals or families to participate in recreation services.
2. **Fee Policy and Facility Allocation:** Outlines the City's position on cost recovery by different types of groups as well as priorities for facility use.
3. **Parkland Policies:** Usually incorporated within the Municipal Official Plan but often developed separately as part of Department Master Plans. Policy positions may be taken for service level allocations, park hierarchy, disposition of land no longer used as parkland etc.
4. **Joint Use of Facilities:** Usually with schools and a policy position outlining for sharing of facilities, and/or programs. Could be developed with other agencies as well.
5. **Grants to Groups:** The City currently provides annual financial support to a number of groups. It would be appropriate to require groups receiving this support to indicate how their programs, for which they receive municipal funding, contribute to the Departments strategic goals.
6. **Support to Volunteer Organizations:** The CSD has a number of procedures related to its support to volunteer organizations e.g., scheduling, rates to use municipal facilities, provision of community office space and storage etc. A policy would outline what the CSD hopes to achieve by supporting volunteer organizations, the services and supports they provide.

Actions:	Policy and Planning	Lead	Priority	Considerations
F-1:	Identify all Department Plans that may include policy directions (e.g., the Recreation and Green Plan) and assess the degree to which these plans and associated policies remain relevant in the context of the 2012 CSD Strategic Plan.	CSD Director	H	<ul style="list-style-type: none"> <li>• The frequent change at the Director level may be one reason that some plans and policies that are referenced, are not in regular use. However, the date of these plans is unknown.</li> <li>• Policies and relevant plans should be available to all staff and updated regularly.</li> </ul>
F-2:	Ensure that the following policies are in place (developed, updated and/or documented): fee assistance; facility allocation; land acquisition, and park hierarchy; joint use agreements with schools or other service providers; grants to groups, and support to volunteer organizations.	CSD Director All CSD Staff	M & O	<ul style="list-style-type: none"> <li>• All existing policies should be updated to reflect the Strategic Plan and new policies written as required (based on whether or not they currently exist).</li> </ul>

## 4.8 Staffing

<b>Goal</b>	Maintain and attract qualified staff to deliver quality programs and customer services.
-------------	---

The City of Summerside has impressive indoor and outdoor recreation infrastructure providing extensive opportunities for high quality programs and experiences. With that infrastructure in place the most important asset the City and Department has are its staff. Well-trained, knowledgeable and effective staff understand the importance of leisure services to community wellbeing, appreciate the benefits of these services, know how to develop and maintain partnerships, can write and monitor policies that support these important services, and can manage facilities so that they are financially sustainable. The actions that support this goal contribute to a strong staff group in keeping with the infrastructure with which they are charged.

The outcomes tied to this goal include engagement of all residents in active healthy recreation, opportunities for personal growth, social integration and community cohesiveness and pride, strong and sustainable community organizations, financially sustainable services, pride and care of the natural environment, and attraction of visitors and tourists.

### 4.8.1 Actions for Staffing

#### Responsibilities of the Department

Throughout the strategic plan's development there was discussion of the dual focus on recreation and entertainment. As has been noted previously, with the opening of the CUP and its significant space opportunities and need for ongoing revenue, the entertainment function of the Department has grown. There is some evidence that this focus has pulled staff resources from other operations of the Department.

#### Staff Complement

There has been some instability at the department director level since the opening of the CUP, a situation that is particularly challenging in light of the significant cost and responsibility of operating that facility along with the other responsibilities of Department. Adjustment in staff complement has changed somewhat since the opening of the CUP. There are more instructional pool staff, and additional maintenance staff. However, as programming and events at the CUP have increased (as well as other services across the City) gaps in staffing have emerged. The degree to which these gaps reflect insufficient staff numbers, the way staff are deployed, or the skills and experience of existing staff needs to be assessed.

### **Staff Skills and Experience**

In addition to requiring a certain number of staff to manage the work of the Department the skill sets and experience of staff must fit with these responsibilities. These responsibilities include overall facility and open space management; management of specialty areas including aquatics, fitness, entertainment events; and general skills related to volunteer and community development, policy and planning, customer service, promotions and communication, partnership development and management, administration and scheduling, financial management etc. Some of these requirements may be shared by staff responsible for specific areas e.g., aquatic staff who provide input to their budget, with specialists who may be staff within the CSD or another City department. Again, it is beyond the scope of this Plan to assess staff skills and experience relevant to responsibilities, although it is important to identify actions to address this issue.

This issue reflects (1) the needs of today's operations, (2) the significant requirements of a department responsible for a significant part of the City's infrastructure and budget, (3) a staff group that reflects the complement that existed prior to the development of the CUP and (4) perhaps a different operating model.

### **Implementing the Strategic Plan**

The existing staff complement may not be consistent with the workload of the Department. This Plan has noted that point as it reflects input provided by key informants. The Plan does not assess staff capacity, nor is that task consistent with a strategic plan. As current workload appears to represent a challenge for Department Staff the additional actions of this Plan will further stress those resources. At minimum transitional support will be needed to assist with its implementation.

Actions: Staffing	Lead	Priority	Considerations
G-1: Use the actions included in the section on financial sustainability, specifically R4-1, 3, 4 and 5, to assess the financial and staff implications of retaining the entertainment function within the CSD.	CSD Director CSD Entertainment staff	M	<ul style="list-style-type: none"> <li>• See D-1, D-3, D-4, D-5.</li> <li>• See G-2, G-3, G-4</li> </ul>
G-2: Adopt a method of tracking staff workload relative to specific aspects of staff job descriptions as a prelude to a Department Operational Review.	CSD Director All CSD Staff	H & O	<ul style="list-style-type: none"> <li>• The CSD has: a new director, a fair amount of turnover at the Director level since the opening of the CUP, financial challenges when it operated in the past as an entertainment promoter, relatively new staff to the entertainment portfolio, and a busy and successful year as it revamped many service areas. Given these many changes and developments and the implications these challenges have had on staff it is important to fully assess staff operations.</li> <li>• To provide a baseline for this assessment and as a precursor to a formal assessment it would be helpful for staff to keep workload or timelogs at intervals over the course of the next year to document time spent on various aspects of their job description.</li> </ul>
G-3: Review current job descriptions and identify aspects of current job descriptions that reflect the goals of the Strategic Plan, those that are inconsistent with these goals, and where goals are not reflected in current job descriptions.	CSD Director All CSD Staff	H & O	<ul style="list-style-type: none"> <li>• As with the previous action this action can be used as a precursor to a formal operational review.</li> <li>• Job descriptions should reflect the overall vision and strategic goals and where they do not they must be updated.</li> </ul>

Actions: Staffing	Lead	Priority	Considerations
G-4: Undertake a Department Operation Review to assess staff complement, skill sets and experience to match staff resources to the requirements of this Strategy.	CSD and HR Directors	H	<ul style="list-style-type: none"> <li>• The Department will have valuable information for a focused operational review if time spent on work activities, and the degree to which current job descriptions and day-to-day activities match the requirements of the Strategic Plan, are tracked.</li> <li>• Recommended for the medium term of this plan (<i>after at least a year has passed to allow the new staff group and new initiatives to settle in</i>).</li> </ul>
G-5: In the context of a full operational review assess the need for a General Manager to operate the CUP.	CSD & HR Directors	H	<ul style="list-style-type: none"> <li>• See G-4</li> </ul>



# **Implementation & Monitoring**

**5**

## 5.0 IMPLEMENTATION



The final section of the Strategy identifies the anticipated costs, an implementation schedule, and a process for updating and monitoring the strategy.

### 5.1 Costing and Implementation Considerations

Table 5.1 outlines staff time and costs associated with the Actions of the Strategy.

The City of Summerside is not necessarily responsible for all costs. Some costs may be supported through grants from other levels of government or other agencies, community fund-raising, partner contributions, sponsorships and donations, among other means.

Costs are noted as “staff time” or actual dollar costs. Staff time is further specified as CSD Staff (CSDS) or other City Staff (OCS). It is not easy to quantify staff time. Available skills and experience, available capacity, and the scope of the output will influence how much staff time a particular action will take.

All action steps require staff time, however a number call for areas of expertise that may not currently be present in the Department including policy development, promotion/communications/marketing that require technical support, and cost-centre analysis. As well there are actions that call for staff resources to work directly with volunteers in a community development role. There may be a need for additional resources to assume the function of general manager of the CUP..

Table 5.1: Staff and Operating Cost Considerations

ACTION		Staff Time	\$ Cost
Actions to be completed in the short term 2012-2014 (H) (* indicates also Ongoing)			
A-1:	Communicate all the opportunities in the City to participate in low and no-cost leisure time activities and the benefits of this participation through press release, program brochure, and a specifically focused brochure.	CSDS & OCS	5,000
A-6:	Work with existing participants of municipal programs, and with partners as appropriate, to identify barriers to participation other than ability to pay, and consider how these might be addressed. <i>*(also ongoing)</i>	CSDS	
B-1:	Establish a committee of agency and organizational service providers in the City who address the recreational, health and social needs of residents of all ages, for the purpose of identifying program and social needs, providing a multi-provider approach to service provision, and advising the City on policy directions that support access to recreation.	CSDS	
B-2:	Initiate discussion with Schools in Summerside to identify mutually beneficial opportunities for children and the community to utilize the facilities of each organization with respect to active healthy recreation.	CSDS	
B-3	Establish a biannual meeting with community sport groups to discuss issues of mutual concern and the ways these can be managed to benefit the City and organizations.	CSDS	
C-1:	Each operational sector (e.g., pool, fitness, arena, parks, trails) should establish processes to regularly review maintenance issues -internally and with patrons - to identify realistic maintenance deficiencies. Deficiencies should be identified as: (1) requires different staff procedures (2) requires consistent staff training (3) required different/new instructions to patrons (4) reflects staff complement or distribution issues. Procedures to address issues that fall into 1, 2 and/or 3, should be implemented immediately.	CSDS	
C-2:	If a significant number of maintenance challenges do not reflect easily managed responses of training, new procedures for staff and/or patrons the CSD should undertake a workload assessment to confirm requirements and options to expand maintenance resources. <i>*(also ongoing)</i>	CSDS	

ACTION		Staff Time	\$ Cost
Actions to be completed in the short term 2012-2014 (H) (* indicates also Ongoing) Continued			
D-1:	Adopt a cost-centre budget process to track costs and revenues for events, entertainment and each major service area (e.g., aquatics, sport fields, event arena, community arena etc.) in the CSD. <i>*(also ongoing)</i>	CSDS & OCS	
D-2:	Identify and develop membership and program sponsorship opportunities that expand use of the CUP, with a focus on expanded use and membership during non-prime hours. <i>*(also ongoing)</i>	CSDS	
D-3:	Using cost-centre expense tracking by unit of use, (e.g., hour, half day etc.) compare actual costs to unit rental charges, and use this information to establish fees and charges to specific users. <i>*(also ongoing)</i>	CSDS & OCS	
D-4:	Prepare marketing and promotional material for use in budget presentations, facility rentals etc., so that facility renters understand the basis for charges and, where appropriate, groups and the community, understand where tax subsidies are given and why. <i>*(also ongoing)</i>	CSDS & OCS	
D-5:	Develop a policy to support tax subsidy for services that contribute to the goals of this Plan, and full cost recovery for facility use that does not connect directly to goals. Further, differentiate between volunteer groups and for-profit providers. <i>*(also ongoing)</i>	CSDS & OCS	5,000 <sup>6</sup>
D-6:	Develop service partnerships with the Boys & Girls Club, the YMCA, and others in the community who can enhance program services to the community while minimizing the need to add staff to the CSD for program services. <i>*(also ongoing)</i>	CSDS	
E-1:	Develop appropriate media and messages to promote and communicate the directions of this Strategic Plan. <i>*(also ongoing)</i>	CSDS	
E-2:	Develop a website presence for recreation services that engages the site visitor, promotes the benefits of recreation and opportunities for participation. Ensure that the site is interactive with opportunities to receive information and provide input through social media such as Facebook and Twitter.	CSDS	\$5,000-\$10,000

<sup>6</sup> Where footnoted, tasks with dollar values may require external support for information gathering, documentation, consultation etc., if not accommodated by existing staff capacity.

ACTION		Staff Time	\$ Cost
Actions to be completed in the short term 2012-2014 (H) (* indicates also Ongoing) Continued			
E-3:	Enhance communication to residents and specifically users of the CUP related to upcoming events, closures etc.	CSDS	
F-1:	Identify all Department Plans that may include policy directions (e.g., the Recreation and Green Plan) and assess the degree to which these plans and associated policies remain relevant in the context of the 2012 CSD Strategic Plan.	CSDS	
G-2:	Adopt a method of tracking staff workload relative to specific aspects of staff job descriptions as a prelude to a Department Operational Review. <i>*(also ongoing)</i>	CSDS & OCS	
G-3:	Review current job descriptions and identify aspects of current job descriptions that reflect the goals of the Strategic Plan, those that are inconsistent with these goals, and where goals are not reflected in current job descriptions. <i>*(also ongoing)</i>	CSDS & OCS	
G-4:	Undertake a Department Operation Review to assess staff complement, skill sets and experience to match staff resources to the requirements of this Strategy.	CSDS & OCS	\$30,000- \$50,000 <sup>7</sup>
G-5:	In the context of a full operational review assess the need for a General Manager to operate the CUP <sup>8</sup> .	CSDS & OCS	
Actions to be completed during the medium term of the Strategic Plan 2015-2017 (M)			
A-2:	Develop capacity within the CSD for volunteer and community development support. Develop processes including job descriptions, and associated policies, for this support and communicate its availability.	CSDS	May be identified as additional staff in future.
A-3	Work with partner agencies, other City Departments and staff to develop a fee assistance policy and process to support access to programs by persons with low-income, including those whose income reflects a disability with implications for income level.	CSDS & OCS	\$5,000 <sup>9</sup>

<sup>7</sup> The need for additional staff or changes to current job descriptions( to reflect the objectives of this Strategy) would be confirmed by an operational review.

<sup>8</sup> It is premature to identify the cost of any additional positions until need is confirmed in an operational review.

<sup>9</sup> As with footnote #4

ACTION		Staff Time	\$ Cost
<b>Actions to be completed during the medium term of the Strategic Plan 2015-2017 (M)</b>			
A-4:	Develop policy to support access to facilities and programs by those with disabilities, to reflect but not be limited to: no-cost support for a helper or care giver to assist the patron; integrated programs provided by the City, special programs provided by agencies who work with persons with disability; broad communication of these opportunities.	CSDS	
A-5:	Work with partner agencies, including area schools to expand use of the CUP, other City facilities, and schools.	CSDS	
B-4:	Review facility allocation policies and procedures to ensure they outline the City's objectives related to inclusion, benefits and accessibility and share these policies and processes with community sport and recreation groups who utilize municipal sport and recreation infrastructure.	CSDS	
E-4:	Develop and communicate opportunities for community engagement related to development of new infrastructure, changes to existing infrastructure and services.	CSDS	
F-2:	Ensure that the following policies are in place (developed, updated and/or documented): fee assistance; facility allocation; land acquisition, and park hierarchy; joint use agreements with schools or other service providers; grants to groups, and support to volunteer organizations. <i>*(also ongoing)</i>	CSDS	
G-1:	Use the actions included in the section on financial sustainability, specifically D-1, 3, 4 and 5, to assess the financial and staff implications of retaining the entertainment function within the CSD.	CSDS & OCS	

### 5.1.1 Summary of Financial Implications

The most significant action (with respect to dollar value and implications for achieving the Strategy's goals) is the operational review. Until that review is completed (e.g., with reallocation of staff resources as needed, acquisition of required skill sets etc.), it may be difficult to achieve many of the other high priority actions. Several actions noted as medium priority, e.g., A-3 and A-4, are in this category simply because it may not be possible to complete these within the current staff complement and/or skill set. In other words, the CSD, as it is currently structured and staffed, may not be positioned to carry out many of these actions.

Additional staff time and appropriate experience are required to write policy, develop partnerships, and prepare processes for cost centered budgeting. Current staff complement and the existing skill sets are well aligned to running a major recreation and event facility but less well positioned to carry out the actions and achieve the strategic goals of this Plan.

Only one action of medium priority has a dollar value attached for a total of \$5,000 (current dollars). The reallocation and/or addition of staff from the high priority operational review may in fact provide the needed staff resources within the Department negating the need to engage external support for actions A-3 and A-4.

In the first two years of the Plan, additional costs are estimated at between \$45,000 and \$70,000 depending on scope of the various projects. Each action item will come before Council in the annual budget process at which time actions will be described and costed in detail. The City's Director of Finance Mr. Malcolm Miller was asked to comment on implications of additional non-staff cost. He noted: "assuming tax increases are not an option and all things being equal, the cost estimates of \$45,000 to \$70,000 will need to be assessed relative to other priorities of both the CSD and other City departments, including annual capital spending priorities".

Some actions e.g., F-5 (that the operational review should assess the need for a General Manager for the CUP) could result in additional resource requirements. However, until a full assessment of the staffing challenges and opportunities of the Community Services are known it is premature to anticipate what, if any, those additional costs would be.

### 5.1.2 Financing Approaches

Parks and recreation services are financed through municipal taxes, user fees/charges, and regular or occasional program specific funding from other levels of government. It is sometimes not appreciated that these public services are also “financed” through the significant contributions of community volunteers and partner agencies. Summerside provides several organizations with annual grants to support their programs. By providing annual grants the City extends its own, and the organizations’ reach, with respect to leisure opportunities.

A number of organizations indicated interest and willingness to assume some of the program initiatives noted in the Plan. Both the Boys & Girls Club and YMCA have long histories in Summerside and/or other communities across Canada with such initiatives. Stronger and more formal partnerships represent one way to “finance” the community’s leisure needs.

This plan recommends developing a policy to support low-income participants, a common policy among Canada’s municipal leisure departments. These policies are often funded by an annual allocation from the tax base and by contributions from residents who wish to support these initiatives. Allocation of funds can be provided on request along with supportive documentation. Alternatively, the City could hold a selected number of “spots” in swim classes, summer camps etc., and make those available through the discretion of appropriate community agencies who in turn make arrangements for their clients.

Most volunteer sport organizations are familiar with programs such as Canadian Tire Jumpstart® and KidSport™ and promote these programs to participants who may need additional financial support. This plan has not indicated a cost for this policy as there may be none, depending on how the policy is developed or administered.

Many leisure service departments are looking at their fees with a view to reflect the true cost of these services and the ability of participants to pay various fees. For example, recent pricing studies for recreation point to the ability of *younger* older adults (the baby boom generation) to pay a greater share if not all of the cost of services. Most communities continue to provide a senior’s discount. For some older adults, particularly those who are currently older than 70, this may make sense. However, demographics indicate that adults who have only recently become “older adults” or who will over the next 10 – 15 years, are on average the wealthiest age-cohort in Canada. This group clearly does not need, and many would not take<sup>10</sup>, reduced costs for participating.

---

<sup>10</sup> Turcotte, Martin and Grant Schellenberg (2007) A Portrait of Seniors in Canada 2006. Ottawa: Statistics Canada. Catalogue no.89-519-X1E; and Yates, Thorn and Associates. 2006. City of Kelowna Seniors Services Strategy. A report prepared for the City of Kelowna Recreation, Parks and Cultural Services. February 2006.



As well as carefully considering to whom and for what reason price discounts are given, it is important to understand and communicate to tax-payers, the true costs of providing a service. The more residents and user groups understand what real costs are the better able they are to contribute to decisions on how finite tax resources should be distributed.

Compared to many similar plans prepared by the consultants this one does not include significant capital costs. It does include significant staff time, which we appreciate is not insignificant. The City has done a tremendous job of providing a high level of leisure infrastructure. The focus of this plan is on the continued sustainability of this infrastructure. Three points with respect to options for financing of these services.

- Knowing and communicating to participants and stakeholders including residents the true cost of providing a service;
- Reviewing the level of tax subsidy to specific services and for specific groups (e.g., by age, or interest) and raising or lowering those subsidies as appropriate;
- Developing and appreciating partnerships and recognizing that in addition to providing funds that support their services they in turn are providing significant volunteer or organizational hours that in turn extends the reach of the City's leisure services.

## 5.2 Monitoring the Strategy

There are twenty nine actions in this Plan. Reviewing and noting that they have been completed or achieved is straightforward. This should be done annually with a report to Council on the status of actions' achieved.

The actions noted are not the only ones that can move the goals of the Community Services Department forward. While the twenty nine actions of this Plan are important and are priorities to achieve the goals, ultimately reaching these goals will result in achievement of the planned future. Therefore, in addition to annual reporting on the status of actions it is necessary to communicate where additional or existing actions contribute to these goals and to provide solid and measurable evidence of these achievements.

### 5.2.1 Indicators to Monitor the Plan's Achievement

Indicators or "measures" include both whether an action is completed and the results of that completed action. Most of the actions have well defined "things" to be done, whether developing a policy or a partnership, promoting a process, undertaking additional planning etc., and reporting on their completion should be straight forward. Documenting the results of those actions – to illustrate movement toward the goal – is more involved.

For example: the first action A-1 "Communicate all the opportunities in the City to participate in low and no-cost leisure time activities and the benefits of this participation through press release, program brochure and a specifically focused brochure." The products of this action are not particularly complicated. However, this action is not simply about creating copy with nice pictures of the City's trails, and visuals of people involved in healthy activities. It is about people using these low-cost facilities and gaining those benefits. Measures of participation can come through observation of activity both before and after the promotion, documentation of increased use through partnered programs, and responses to Twitter and Facebook sites. Programs such as *SOGO Active* and *In Motion* are accessible interactive community based programs that help individuals monitor their healthy activity. Communities have linked these sites to their home pages and can monitor their community's participation.

Similar measures to monitor each action can be outlined by the staff to whom an action is delegated. The tables in section 4.0 identify the CSD Director as the individual responsible for most Actions. However, while the CSD is ultimately responsible most of these actions will be delegated to various department staff. Actions should be incorporated within staff job descriptions and measured annually as part of performance reviews. In this way the strategic plan becomes a living document with clear responsibilities allocated for its achievement.

### 5.3 Updating the Strategy

Strategic plans are typically designed for a specific period. The Strategy incorporates a vision of a planned future and goals to manage immediate situations that are in the way of that planned future. It would be unusual if five years from now the future vision changed completely. More probably, the vision will stay the same, some of the most problematic challenges to achieving the vision will have been addressed and the next Plan will establish new goals to address the challenges of the day. Ideally those will not all be new significant challenges but ones that for the most part were not the most pressing when the strategic process of achieving a desired future started.

With many of the most critical goals achieved other goals will emerge and become the focus of the next five years. This also assumes of course that the goals identified in this Strategy become part of the cultural context for the Department. A strategic plan does not identify all or the only actions of an organization, only those that need immediate attention.



## ACKNOWLEDGEMENTS



The City of Summerside's Strategic Plan for Community Services was created under the direction of a Steering Committee composed of the following individuals:

Mr. JP Desrosiers	Event Development Officer
Mr Bobby Dunn	Director, Community Services Dept.
Mr Paul Gallant	Program & Scheduling Coordinator
Mr Gordon McFarlane	Director, Human Resources Depart.
Ms. Barb McNeil	Aquatics Manager
Mr Malcolm Millar	Director, Finance Depart.
Murray Pinchuk	City Planner
Ms. Melanie-Ramsay-Mugridge	Fitness Manager
Mr. Sean Murphy	Client & Administrative Services Manager
Trent Williams	Outdoor Facilities Supervisor
Councillor Frank Costa	Municipal Council
Councillor Jim Steele	Municipal Councillor
Councillor Corey Thomas	Municipal Councillor

The efforts of Steering Committee - who provided ongoing input to the planning process, assistance with gathering background information, review of report drafts, and support of and contribution to the consultation process, is acknowledged. The active involvement of Committee Members ensured the accuracy and completeness of information and analysis. The efforts of this group were sincerely appreciated.

W Donovan  
Principal  
dmA Planning & Management Services  
June 2012